Conducting Effective Meetings

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Presented by

Ivan Rosenberg, Ph.D.
Frontier Associates, Inc.

Gary Blackwood, Ph.D.
California Institute of Technology
Jet Propulsion Laboratory

Conducting Effective Meetings

- Meetings in General
- Five Steps to Effective Meetings
- Practical Tips
- Software Tools

The Cost of Meetings

- Assume for the meeting is any interactive time with another person (telephone, hallway, etc.)
- A common perspective is that on average 50% of a person's workday is wasted just due to ineffective meetings.

What's Wrong With Meetings?

- Too long and too many
- Purpose not clear
- Don't produce the intended results
- People not prepared
- Wasted time is not visible

- Used for information distribution
- Some people dominate the meeting
- Superiors thinking of their own efficiency
- No one is managing the conversation

Assumptions about Meetings

- No preparation time is needed
- No skill needed to run meeting
- No focus is needed on running meetings better
- Meetings are inherently inefficient
- Must have meetings.
- Holding a meeting is a solution to everything.

Purpose of a Meeting

People thinking together

Definition of a Meeting

A meeting is a group of people thinking together to forward the fulfillment of common commitments and accountabilities.

Conducting Effective Meetings

Conversation is a meeting of minds with different memories and habits. When minds meet, they don't just exchange facts: they transform them, reshape them, draw different implications from them, engage in new trains of thought. Conversation doesn't just reshuffle the cards: it creates new cards.

-- Theodore Zeldin

President of the Oxford Muse Foundation, English philosopher, sociologist, historian, writer and public speaker.

Signs People are Thinking Together

- High percentage of involvement
- New ideas
  being suggested
- High energy
- No make wrong

Meetings as a Set of Conversations

- One way to look at meetings is as a set of conversations.
- Then a meeting's effectiveness could be said to be a function of our ability to manage the conversations appropriate to meetings.
- Conversation Manager: Job is to have the conversation accomplish its purpose.
  - Perceived as neutral.
  - Is not involved in the content, only the process.

Guidelines for Good Meetings

- Operate according to the suggested definition of a "meeting"
- Plan (agenda, etc.)
- Service: participants as your customers
- Integrity / Time Management
- Meeting Roles
- Manage the Conversation

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  1. Establishing a Meeting
  2. Preparing for a Meeting
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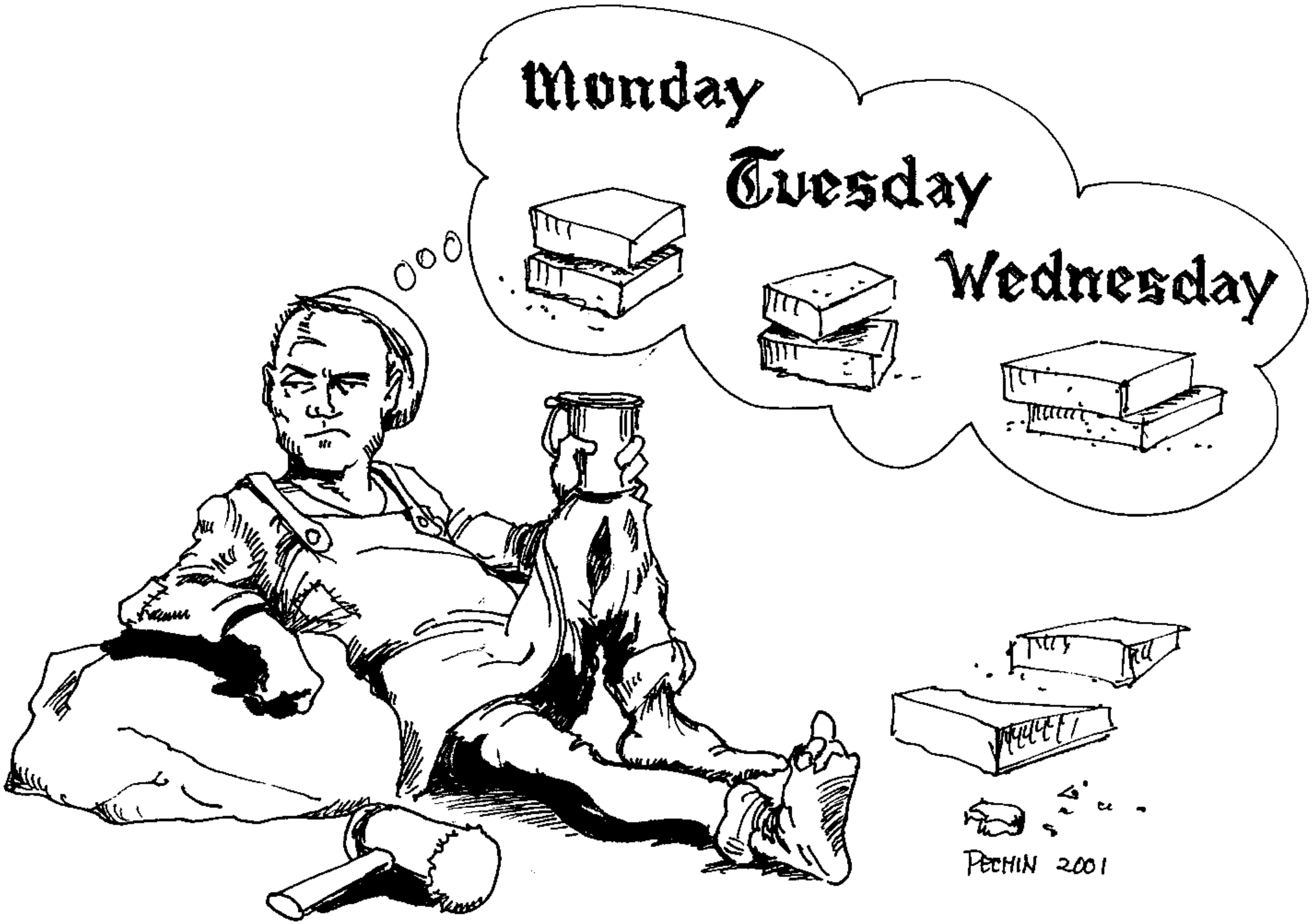
1. Establishing a Meeting

- Create Meeting Purpose
- Create Meeting Agenda
- Identify and Enroll Participants
- Establish Logistics

Create Meeting Purpose

- Create the Commitment that the Meeting forwards.
  - Example of Commitment: The Story of the Three Stonecutters


Monday
Tuesday
Wednesday
PECHIN 2001


PECHIN 2001

Actions, Goals, and Commitments

- An action is a movement, something that is happening *(I'm cutting stones).*
- A goal is a condition that someone intends to be true by a specific time in the future *(I cut two stones/day).*
- A commitment is a state of being emotionally impelled *(I'm building a cathedral).*

Examples: Commitments that a Project Meeting Might Forward

- The project is successful.
- The report is a contribution to its readers.
- Any obstacles to accomplishing the project's goals are successfully resolved.
- All our customers are satisfied all the time.
- Forward the high quality strategy of the company.

Create Meeting Purpose

1. Create the Commitment that the Meeting forwards.
2. Create the Intended Results of the Meeting.
   - What is it that we want different at the end of this meeting that wasn't true at the beginning of it?"

Examples: Intended Results Used in a Project Meeting

- All actual or potential problems that were known to the participants were listed and next steps established for each one to the satisfaction of all participants.
- All obstacles to delivering all the work of [Project] have been identified and resolved.
- The group is in agreement regarding the strategic direction to be taken.

3. Determine Whether to Hold the Meeting

- Does the potential group of attendees have a common purpose?
- Is there a clear and shared Meeting Commitment?
- Are there clear and shared Meeting Intended Results?
- Do the Meeting Intended Results require thinking together?
- Is the cost of the meeting justified?
- Will the Meeting Leader and the participants be adequately prepared for the meeting?

4. Create the Meeting Measurable Results

Meeting Measurable Results are the objective, measurable, visible results that will be used at the end of the meeting as evidence that the meeting was successful.

Examples: Measurable Results

- All next steps have been recorded as actions (promises).
- At the end of the meeting the president of the prospect company said to our presenter, "That was a great presentation."
- The group formally agreed on a strategy to be followed.
- A list of possibilities was generated and a next step established to analyze them.
- A particular decision was made.
- The prospect agreed to have another meeting on a specific date.

1. Establishing a Meeting

- Create Meeting Purpose
- Create Meeting Agenda
- Identify and Enroll Participants
- Establish Logistics

Meeting Agenda Guidelines

- Always have one
- Establish the Meeting Purpose
- Determine time available
- Determine agenda items and order
- Establish meeting policies
- Distribute the agenda in advance

Agenda

Customer Service Team Meeting

Friday, June 26, 2000:12:00pm – 2:00pm

Location: Building 16 Room 1-C

Agenda Version 2

Meeting Purpose:

Commitment: Everyone who comes in contact with our company is delighted with our service at all times.

Intended Results: To uncover and resolve all obstacles to extraordinary customer service among existing customers.

Measurable Results: Everyone at the meeting says they are complete that all known obstacles have been appropriately handled.

Meeting Leader: Larry Dooley
Meeting Manager: June Cole
Meeting Recorder: Rick Able
Meeting Participants: Customer Service Team

For confirmations and questions, contact Sheila Jones at X2952. Please confirm your attendance by June 20, 2000.

1. Open Meeting — **5 min.** — **12:00 – 12:05**
- **Conversation for Background of Relatedness**
- **Review Agenda**

2. Review of Due Promises — **5 min.** — **12:05 – 12:10**

What	Who	Date Due	Yes	No
Present ABC Report to Sr. Mgmt.	Ken	June 12	X	
Deliver Customer Service Report Form to Jerry	Jack	June 12	X	
Finalize Annual Service Statistics	Brian	June 12	X	
Establish Monthly Status Calls with XYZ Manufacturing	Dave	May 31		X

All logical and version info at top

Meeting Purpose

Meeting Roles

RSVP info

Open meeting

Promise Review

Agenda Item Order

- Ease of disposal (easiest first)
- Logical order (schedule those that must be considered first)
- Controversy (least or most first, or mix)
- Importance and Urgency

Importance vs. Urgency

		IMPORTANCE	
		LOW	HIGH
URGENCY	LOW	Consent Calendar	2
	HIGH	Consent Calendar	1

Consent Calendar

3. Consent Calendar — **5 min.** — **12:10 – 12:15**

What	Recommendation	Importance	Urgency
Decide Location of Holiday Party	Sportsman's Lodge	Low	**High**
Schedule Remaining Staff Meetings	See attached schedule	Low	**Low**
Schedule speaker for January meeting	Joe Frank	Low	**Low**

- For Low Importance Items
- All items handled with one up (or down) vote
- No discussion (can remove item on request)

Agenda Item

6. Roles and responsibilities of Customer Service Departments 65 min. 12:40 – 1:45

- **Intended Result:** Establish a set of roles and responsibilities governing the interaction between the various teams serving the customer
- **Commitment:** The Customer Service teams operate in a seamless manner in delivering on the Customer Service Commitment.
- **Conversation:** Conversation for Resolving Obstacles
- **Presenter:** Elizabeth
- **Conversation Manager:** Henry
- **Importance: High**
- **Urgency: Low**
- **Preparation:** Read Supporting Documents. Survey your department and create a list of past interaction problems.
- **Supporting Documents:** *Role Statement: Customer Service Dept.* (available via the company intranet at www.asi.com/custsupp/role.doc)

-Title
-Elapsed Time
-Start / End Time

Intended Result

-Presenter
-Conversation Manager

-Preparation
-Supporting Documents

7. Complete the Meeting 15 min. 1:45 – 2:00

- Review Action Items/Promises Generated in This Meeting

What	Who	Date Due

- Determine Agenda Items for Next Meeting

What	Elapsed Time	Presenter	Conversation Manager

- Conversation for Being Complete

BACKGROUND INFORMATION

- Unassigned Agenda Items – Future Meetings

- Active Action Items/Promises

What	Who	Date Due

Action Items Generated

Agenda Items for Next Meeting

End Meeting

Unassigned Agenda Items

Promises Not Yet Due

JPL Version of Agenda

Purpose, Roles, Logistics Clear

Project Core Team
Tuesday December 16, 2008
Location: 126-346

Meeting Purpose:	Identify and resolve all obstacles to delivering all the work of Project	
Meeting Leader:	Bob Laskin	
Meeting Manager:	Gary Blackwood	
	Rotating	
tes):	Rotating	Brief minutes sent to core team at conclusion of meeting
tems):	Jennifer Gregory	Posted to AI tool by end of day
	Hardcopies of agenda, action items, and future meetings	
	Events: IBR, Alignment mtg., Technical Telecon, TFMR, Core Team, Planning, and PMR	
	Element, Sub-Element, and Sub-Event= ALL Dates:Previous Wed. to current Tues.	
see:	Docushare lib COL	
Call in number:	### ###-####	Participant passcode is #######

Group the Agenda Topics

	Agenda Item	Presenter	Start	Duration	End	Intended Results
Open Meeting/Status	Open Meeting	Gary Blackwood	8:30	0:05	8:35	Get mentally and physically present. Please turn all cell phones on silent. Attendance and proxies identified
	Report on Action Items Due	Vickie Brown	8:35	0:10	8:45	Report Done or Not Done. Use remaining time for any other discussion on the AI's.
	Report From Above	Bob Laskin	8:45	0:10	8:55	Share the status and instructions necessary to know from above
Recurring Business- Keep The Deal	Calendar Coordination Proj & Core Team Cal in MM	Jennifer Gregory	8:55	0:10	9:05	Review the project calendar and core team
	Review what's due externally Doc#:					external deliverables: s for next PMR.
	RecDels - near term status Doc#:	Greg Tyler	9:1			l path. c/dels and take steps to update

Recurring – "Keep the Deal"

JPL version – p2

Review other agendas for week

Intended Results for each Agenda Item

New Business	CDR Pre[illegible]ation	Michael Brenner	9:25	0:15	9:40	Everyone on core team says they know what they must do for project CDR, and actions promises recorded
Recurring Business-Meeting Preview	System Design Meeting Agenda Col: , Doc#:	Michael Brenner	9:40	0:05	9:45	SE shows an agenda where the topics have been vetted and will be ready for presentation in the next 2 weeks
	Risk (COL#:)/**CCB** Preview (COL#:)	Michael Taylor/ Gary Blackwood	9:45	0:10	9:55	Risks/**CCB** topics for this week are announced. Required attendance is clear.
Close	Summarize New Actions	Vickie Brown	9:55	0:05	10:00	Reviews the recorded actions,names,and dates
	Review Future Action Items	Jennifer Gregory	10:00	0:05	10:05	Review actions to make sure we're keeping "real" dates
	[illegible]uture Meeting Topics	Gary Blackwood	10:05	0:05	10:10	Agree on possible and planned future meetings and topics
	[illegible]pected absences:	Proxy:				

Record new Requests/Actions

Agenda items distributed among team members

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Suggested Meeting Guidelines

- Keep your word
- Follow the Agenda
  - Stick to the topic
  - Be concise
- One person talks at a time
- Listen with an open mind
- Everyone is responsible for the success of the meeting
- All supporting materials are distributed at least 1 week in advance of meeting

Meeting Roles

- **Meeting Leader** – "owns" meeting
- **Meeting Manager** – manages meeting
- **Meeting Recorder** – records meeting
- **Timekeeper** – monitor time
- **Agenda Item Presenter**
- **Agenda Item Conversation Manager**
- **Participant** – responsible for meeting

Beginning the Meeting

- Introductions (as appropriate)
- Get People Present to the Meeting
- Get People Present to the Meeting Purpose
  - Access brain's creative thinking side
- Review Meeting Guidelines (if appropriate)
- "New Business" agenda item.

Reading How a Meeting is Going

- Meetings have ebb and flow.
- Need to be able to read where a meeting is at any particular point in time so can intervene as needed to fulfill the Meeting Purpose.

Completing a Meeting

- Conversation for Being Complete
  - Suggestions for future topics
  - Resolve Parking Lot issues
  - Check Measurable Results, Action Items
- Conversation for Appreciation and Acknowledgement
  - Debrief – What worked, etc.
  - Thank you's
- Declaration of Being Complete

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4. Improving a Meeting

- Immediately after the meeting – major roles debrief
- **Declare the Results of the Meeting:**
  - Were the intentions of the meeting realized?
  - What was produced?
- **Analyze the Meeting Process**
  - What worked?
  - What didn't work?
- **Next Steps**
  - What are the next step(s) and who will take them?
  - Any significant information that should be recorded?

5. Follow-Up After a Meeting

- Set some rules for Meeting Manager (or assistant):
  - Actions distributed electronically within 1 day of the meeting
  - Similar for minutes
  - Announcement of following meeting (if recurring)
- Record these steps at bottom of agenda (for reminder)

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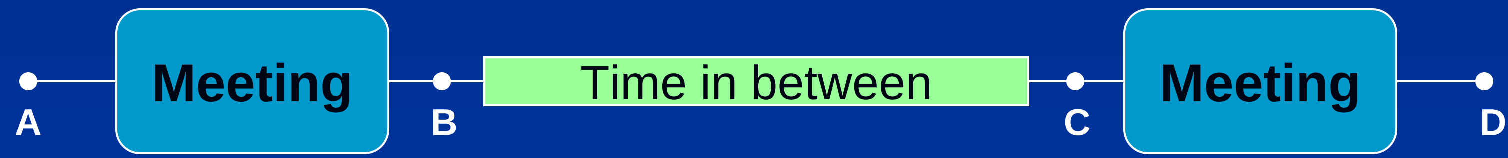
Interpretation for *Recurring Meetings*

- Consider a Group's weekly standing meeting:



- Meeting will change the state of the Group – something should be different at the end of the meeting than at the beginning
- Meeting can also cause a state change <u>before</u> the next meeting
  - Done via assigned actions, assisted by a culture of closing actions (relate to as "promise" instead of "try")
  - Some things handled better between the meetings:
    - "Take it off line."
    - Handle in smaller group and report back.

Tips (1) - Structure

- Key Features of Every Meeting:
  - Room / projector / etc are setup <u>prior</u> to the start of the meeting
  - Hardcopies distributed
  - Time is managed – Timekeeper acts as “Big Ben”, defers to Meeting Manager to manage the remaining time.
  - Next steps are recorded as promises (what / who / when) - Recorder
  - Meeting ends on time
- Key Follow up
  - Promises made – are distributed quickly
  - Promises due – are made visible continuously between meetings

Tips (2) – For Meeting Manager

- Manage the meeting time firmly
  - Be flexible, but protect the end point. Manage to constraints – the group will be pleased!
- Ask questions
  - How can we get there?
  - What's missing?
  - What could go wrong?
  - What are the next steps that we should capture?
  - Can you finish your presentation in 5 minutes?

Tips (3) – Things to do when the Meeting gets Bogged Down

- Meeting Manager asks questions like:
  - In the time remaining, what else do we need to do to achieve the Intended Result?
  - Show of hands - who thinks we have we achieved the intended result of this agenda topic?
- Sometimes a point simply needs acknowledgement without agreeing or disagreeing: "Got it."
- Open up conversation when it's stuck: How about….
  - How about….This idea?
  - How about…We try this for a few weeks and see how it goes?
- Make clear requests.
  - Will you…? Opens up the possibility for a promise to act.
- Manage to discrete end points – avoid unnecessary tangents.
  - Achieve the Intended Results one at a time.
  - Use the agenda to break apart topics into manageable chunks.
- Don't be afraid to ask the Meeting Recorder to capture an action.

Tips (4) - Advanced

- For teams with weekly meetings:
  - Team rules that apply to that meeting, such as:
    - Is meeting mandatory or optional? Are alternates permitted?
    - Do decisions hold even if a member is not present?
    - Cancellation policy (e.g. "if no agenda sent with N hours, the meeting is automatically cancelled")

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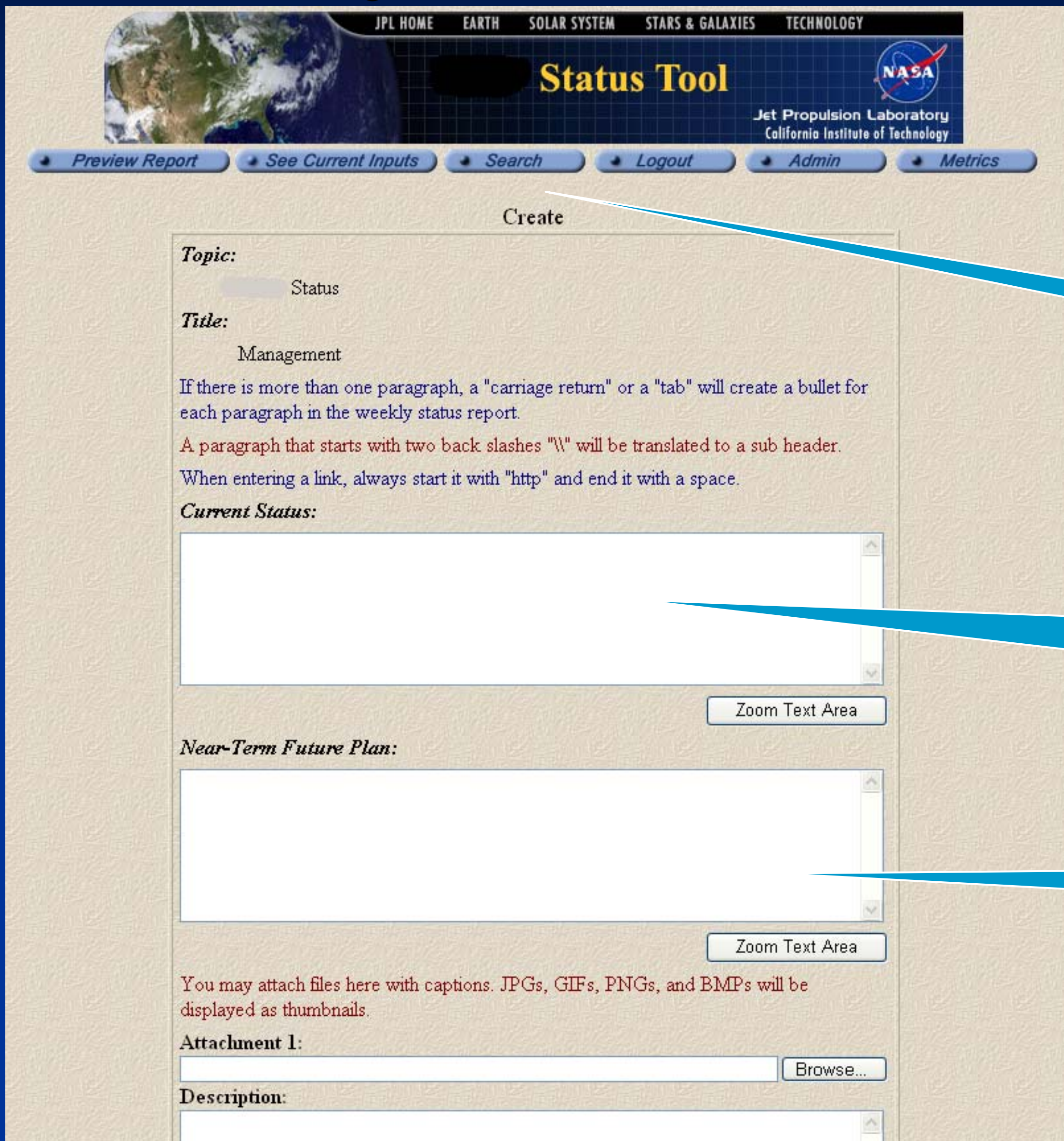
Software Tools

- Used by Meeting Manager and Recorder prior to, during, and after meeting
  - Make the meeting more efficient and effective
  - Serve the participants –promises made visible to all parties
- Three web tools used extensively:

Meeting Tools & Benefits

Tool	Description of Web Tool	Primary Benefit
Project Status	■ Collection, formatting, automatic distribution of project status ■ Searchable records	■ Big time savings for report preparer ■ Group time not spent on status ■ Timely distribution
Action Item	■ Online tracking system for all project actions ■ Visible to managers and all action item recipients	■ Integrates across all meetings on project ■ Replaces multiple Excel lists ■ Reinforces accountability
Meeting Minutes	■ Online record of agenda, minutes, and actions ■ Searchable records	■ Convenient and quick distribution of minutes ■ Automatically populates Action Item Tool

Project Status Tool – Input


JPL HOME EARTH SOLAR SYSTEM STARS & GALAXIES TECHNOLOGY

[redacted] Status Tool

NASA

Jet Propulsion Laboratory
California Institute of Technology

Preview Report | See Current Inputs | Search | Logout | Admin | Metrics

Create

Topic:

Status

Title:

Management

If there is more than one paragraph, a "carriage return" or a "tab" will create a bullet for each paragraph in the weekly status report.

A paragraph that starts with two back slashes "\\" will be translated to a sub header.

When entering a link, always start it with "http" and end it with a space.

Current Status:

Zoom Text Area

Near-Term Future Plan:

Zoom Text Area

You may attach files here with captions. JPGs, GIFs, PNGs, and BMPs will be displayed as thumbnails.

Attachment 1:

Browse...

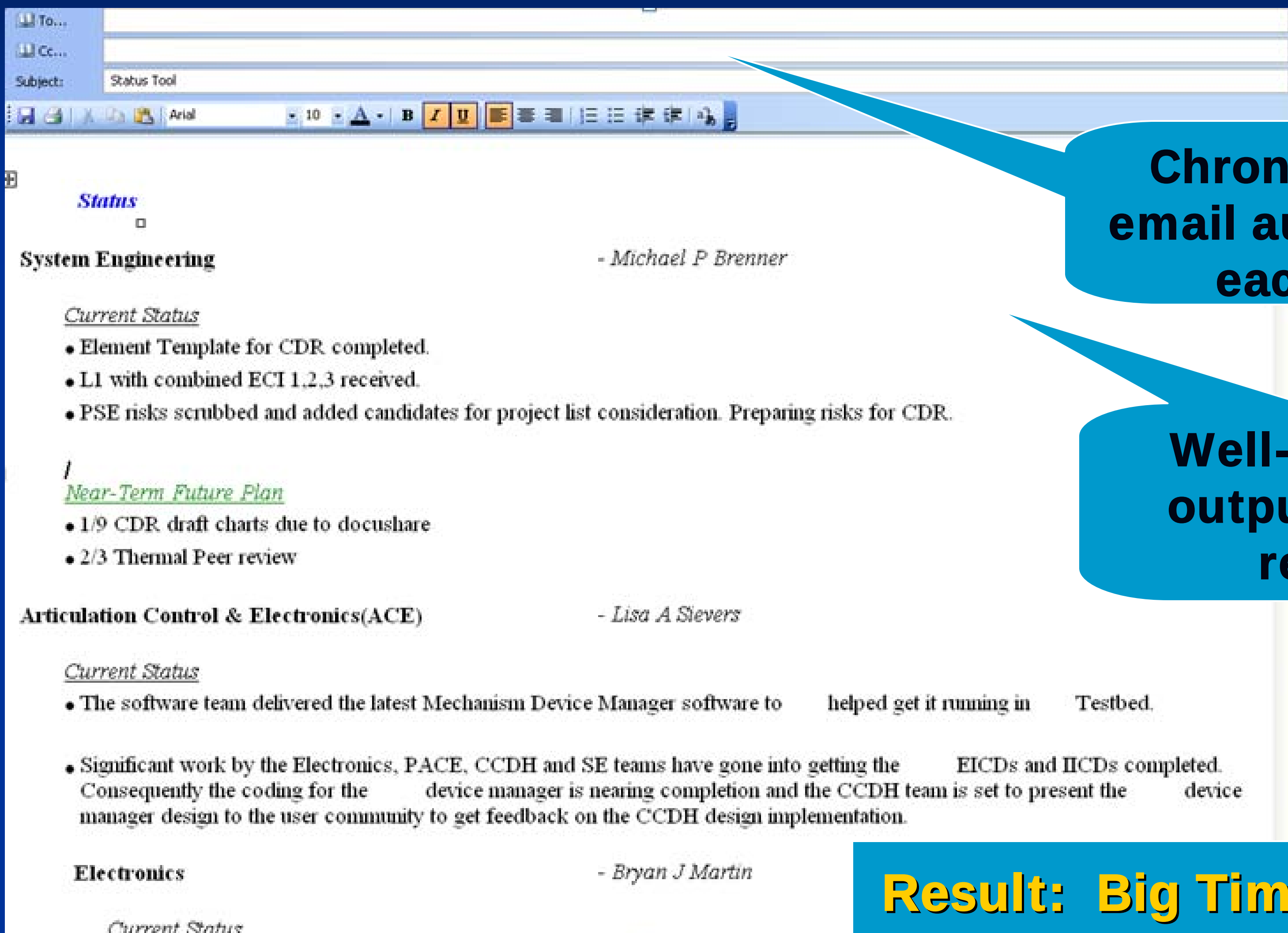
Description:

Historical Status

Input field for brief status

Near Term Plans

Project Status – Output



To...

Cc...

Subject: Status Tool

Status

System Engineering - *Michael P Brenner*

Current Status

- Element Template for CDR completed.
- L1 with combined ECI 1,2,3 received.
- PSE risks scrubbed and added candidates for project list consideration. Preparing risks for CDR.

Near-Term Future Plan

- 1/9 CDR draft charts due to docushare
- 2/3 Thermal Peer review

Articulation Control & Electronics(ACE) - *Lisa A Sievers*

Current Status

- The software team delivered the latest Mechanism Device Manager software to helped get it running in Testbed.
- Significant work by the Electronics, PACE, CCDH and SE teams have gone into getting the EICDs and IICDs completed. Consequently the coding for the device manager is nearing completion and the CCDH team is set to present the device manager design to the user community to get feedback on the CCDH design implementation.

Electronics - *Bryan J Martin*

Current Status

Chron job sends email automatically each week

Well-organized output for easy reading

Result: Big Time Savings!

Action Item Tool

- More than a list in Excel!
- The JPL web-based tool:
  - Accepts actions from multiple teams and events.
  - Integrates all actions on user's home page.
  - Shows manager all actions he/she assigned in various events.
  - Sends reminders to users.
  - Produces convenient reports for meetings.
- Result: Dramatic increase in action completion (across entire project) when compared to Excel lists alone.

Action Item – User's View

Action Item Tool

Jet Propulsion Laboratory
California Institute of Technology

Search Actions | Report | Logout | Help

Search Concerns | Create Concerns | Create Actions | Admin

Please click on "*Help*" button to view the procedure for *creating* or *closing* an action i

Good morning, Gary Blackwood !

You are the **assignee** of the following "Open/Submitted" actio

Due Date color code: Over due; **Due within one wee**

Click on AI No. for Detail

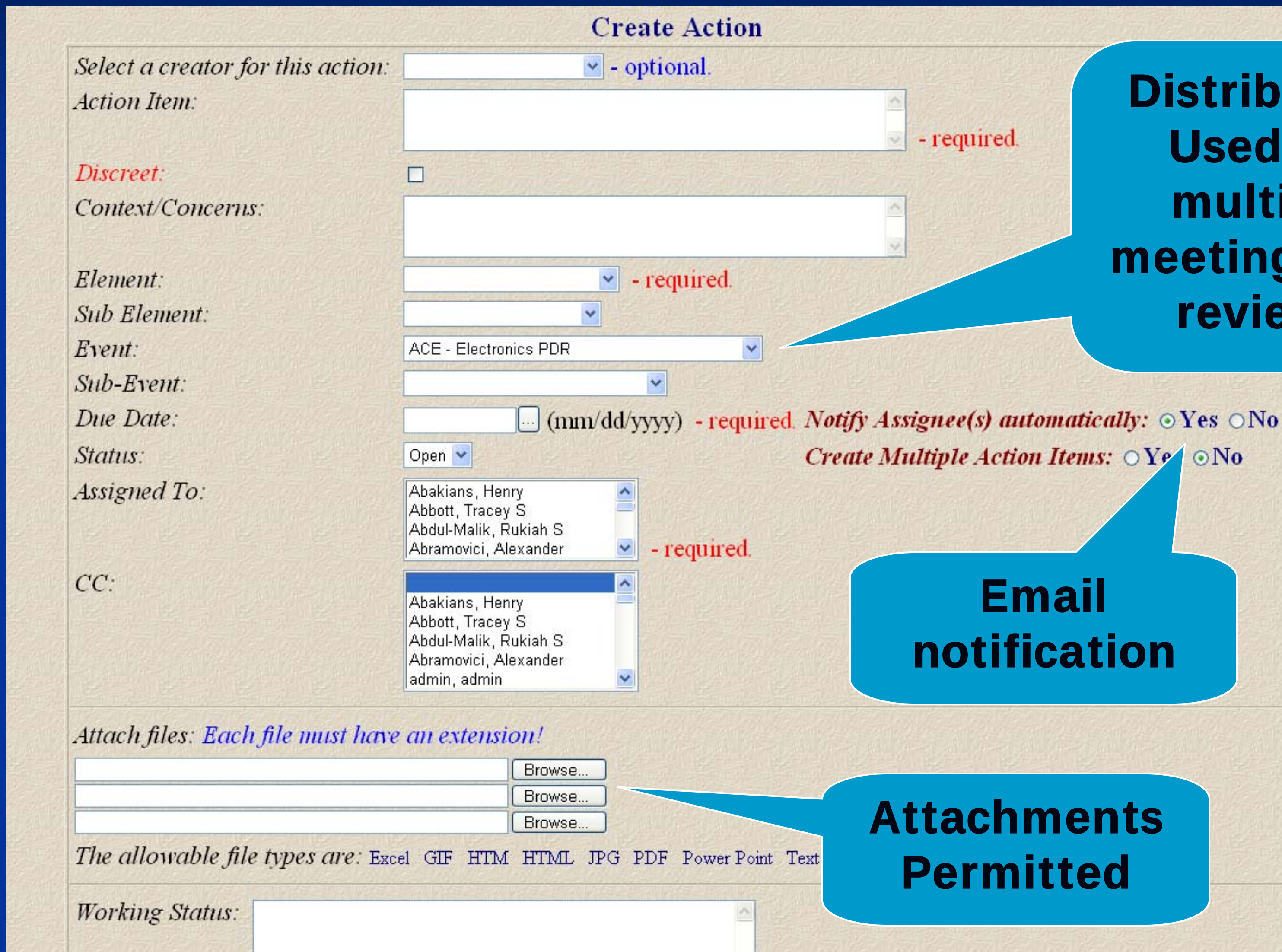
Click on underlined column names for toggle sort

AI No.	Action Item	Element	Sub Element	Event	Sub-Event	Date Created	Due Date	Slip Count	Creator	Status
1812	MPDR- 64 (Requester:) Project to produce an integrated project view of the spares state as planned, and post RFA closure memo 'and' written closure from RFA submitter to Col Action=Board Closure)	Management		PDR		07/21/2008	12/23/2008	1	Michael Brenner	Open
2354	Define what an "acceptable level of risk" is for CDRs	Management		Core Team		11/25/2008	12/22/2008	3	Gary Blackwood	Open
2270	Meet with Jim Rose to discuss risk tool terminology	Management		Risk Meeting		10/03/2008	[illegible]	2	Gary Blackwood	Open

Actions from Different Meetings Collected for User

Slip count boosts closures!

Action Item Tool – Input Page



Distributed: Used for multiple meetings and reviews

Email notification

Attachments Permitted

Action Item Tool – Manager's Page

Manager can see all those actions assigned in their name

You are the **creator** of the following "Open/Submitted" action item(s):

Due Date color code: Over due; **Due within one week or l**

Close Checked Items

Click on AI No. for Detail

Click on underlined column names for toggle sort

To change status, click on Status field

	AI No.	Action Item	Element	Sub Element	Event	Sub-Event	Date Created	Due Date	Slip Count	Assignee	Status
☐	2342	Complete the draft schedule for post-CDR reviews and send to Bob and Gary	System Engineering		Core Team		11/25/2008	01/13/2009	0	Michael Brenner	Open
☐	2407	Understand why monthly obs profile does not track to the monthly workforce profile and get back with Bob, Gary	System Engineering		TFMR		12/11/2008	01/13/2009	0	Michael Brenner	Open
☐	2413	Update tech perf metrics w/ the current CBE for the segment per Jeff Yu	System Engineering		TFMR		12/11/2008	01/13/2009	0	Michael Brenner	Open
☐	2415	Add info to "progress vs. plans" charts. In addition to promise date, add the actual date item was delivered, and the need date.	System Engineering		TFMR		12/11/2008	01/13/2009	0	Michael Brenner	Open
☐	2420	Give more context on the code metrics chart. Include the plan to show progress vs. plans.	ACE		TFMR		12/11/2008	01/13/2009	1	Lisa Sievers	Open
☐	2445	Summarize @ the Special Topics Meeting the template for the HRCR & SRCR Forms for the different types of hardware.	Product Assurance		Core Team		12/16/2008	01/13/2009	0	Michael D Taylor	Open

Action Item – Output Page Used by Recorder in Meetings

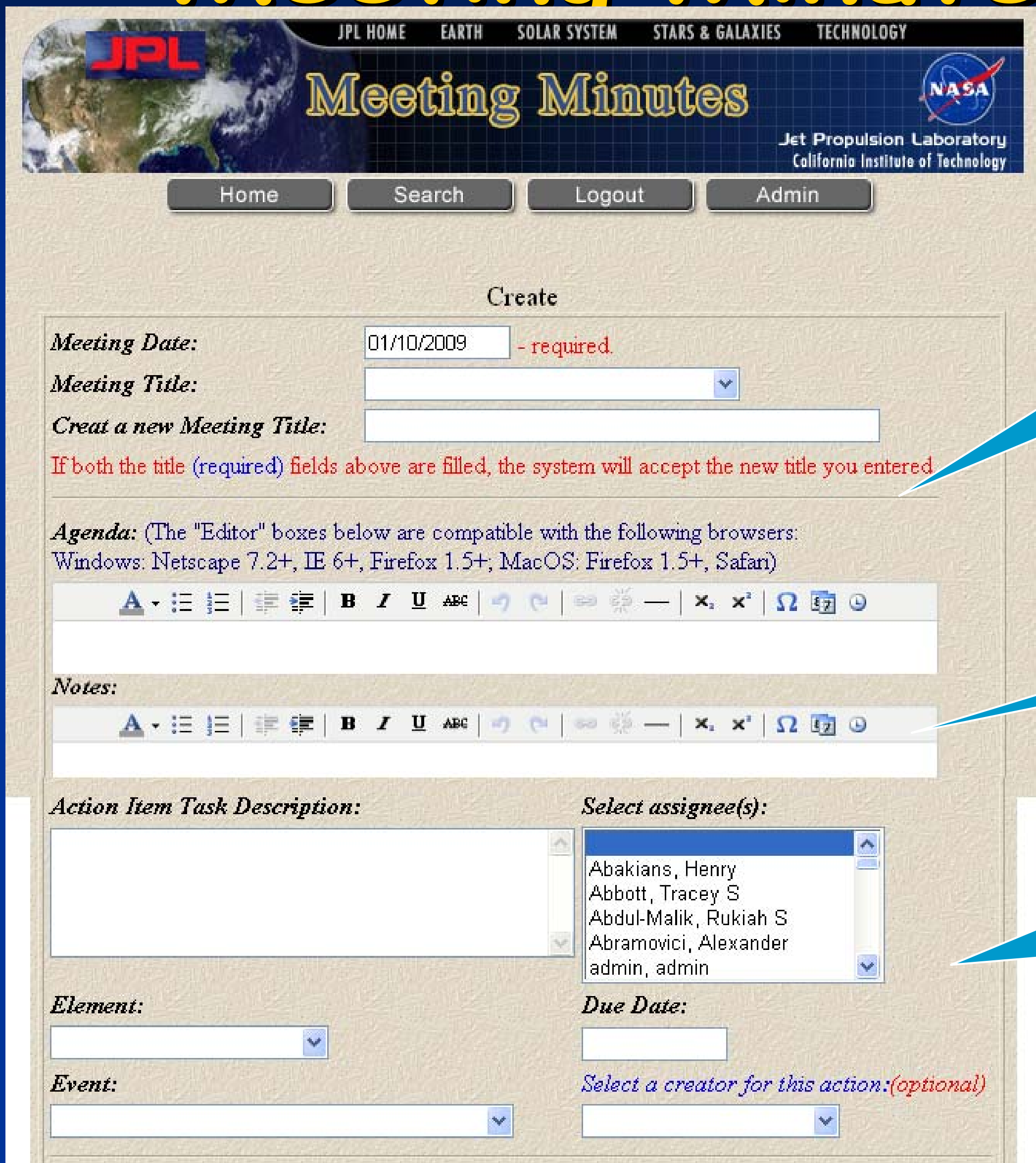
AI No.	Action Item	Element	Event	Assignee	Due Date	Slip Count	Status	Done	Not Done
2363	Make an xls list of chart titles and purpose of each for the ACDR and send to core team	System Engineering	Core Team	Michael Brenner	12/08/2008	0	Open		
1759	Do a sensitivity impact study on the isolator location on the core structure (and present at a tech telecon)	System Engineering	TFMR	Michael Brenner	12/09/2008	7	Open		
2359	Update the "Missed Rec/Del" Table and send to Bob for PMR.	Management	Core Team	Gregory P Tyler	12/11/2008	0	Closed		
2425	Confirm the contract release date for CGH and verify that the task is in the schedule and confirm with Gary B.	MOST I&T	TFMR	[Gregory P Tyler] [Jeffrey J Cornish] [Serge Dubovitsky]	12/12/2008	0	Submitted		

Integrates actions from different forums

Scorecard for meeting attendees

Results:
- Dramatic Increase in Timely Completion
- Fosters culture of Requests/Promises/Completion

Meeting Minutes – Input

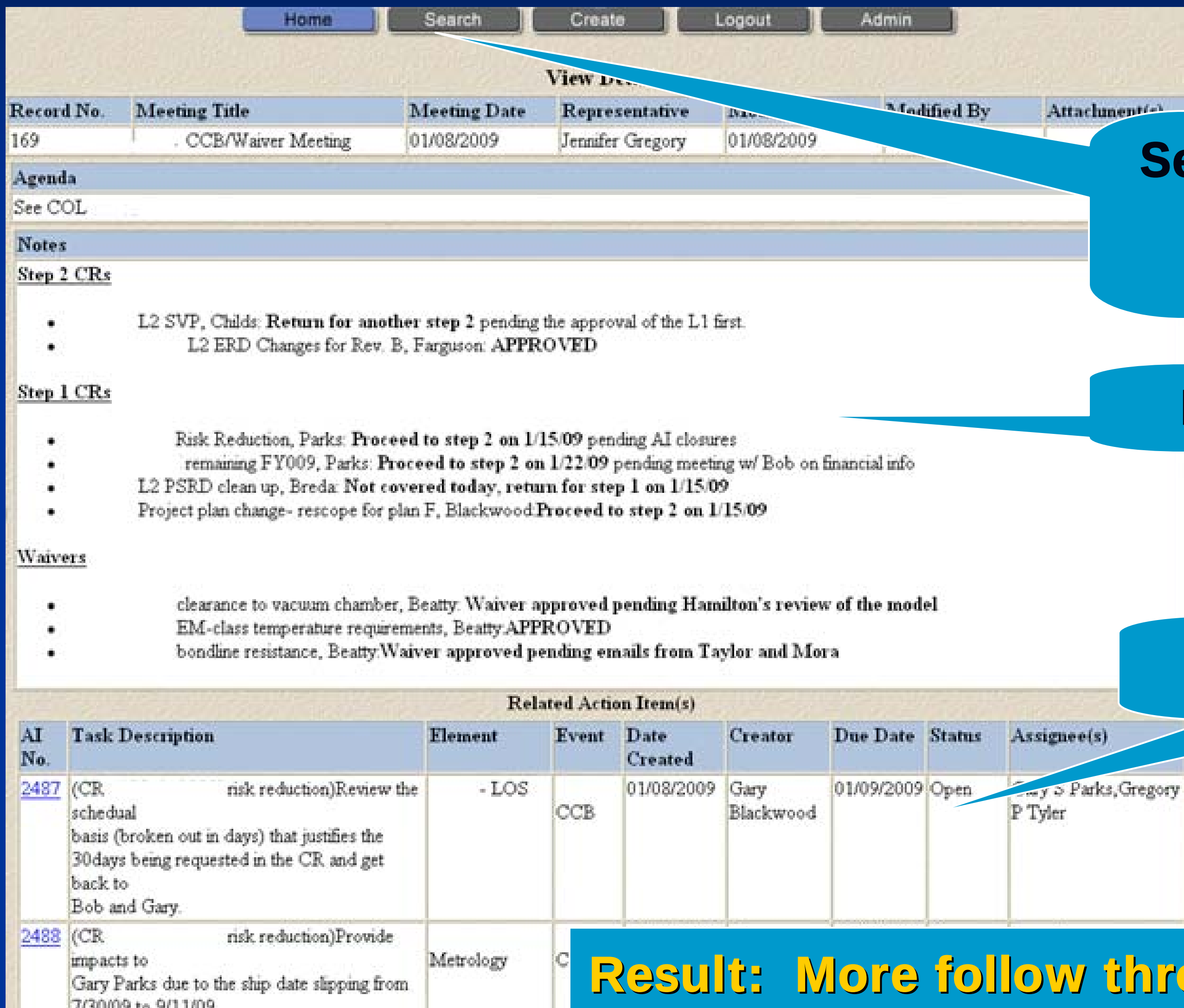


Create Meeting and Agenda

Record notes during meeting

Actions automatically sent to Action Item Tool

Meeting Minutes – Output



Home | Search | Create | Logout | Admin

View D...

Record No.	Meeting Title	Meeting Date	Representative	M...	Modified By	Attachment(s)
169	. CCB/Waiver Meeting	01/08/2009	Jennifer Gregory	01/08/2009		

Agenda

See COL

Notes

Step 2 CRs

- L2 SVP, Childs: **Return for another step 2** pending the approval of the L1 first.
- L2 ERD Changes for Rev. B, Farguson: **APPROVED**

Step 1 CRs

- Risk Reduction, Parks: **Proceed to step 2 on 1/15/09** pending AI closures
- remaining FY009, Parks: **Proceed to step 2 on 1/22/09** pending meeting w/ Bob on financial info
- L2 PSRD clean up, Breda: **Not covered today, return for step 1 on 1/15/09**
- Project plan change- rescope for plan F, Blackwood:**Proceed to step 2 on 1/15/09**

Waivers

- clearance to vacuum chamber, Beatty: **Waiver approved pending Hamilton's review of the model**
- EM-class temperature requirements, Beatty:**APPROVED**
- bondline resistance, Beatty:**Waiver approved pending emails from Taylor and Mora**

Related Action Item(s)

AI No.	Task Description	Element	Event	Date Created	Creator	Due Date	Status	Assignee(s)
2487	(CR risk reduction)Review the schedual basis (broken out in days) that justifies the 30days being requested in the CR and get back to Bob and Gary.	- LOS	CCB	01/08/2009	Gary Blackwood	01/09/2009	Open	... Parks,Gregory P Tyler
2488	(CR risk reduction)Provide impacts to Gary Parks due to the ship date slipping from 7/30/09 to 9/11/09	Metrology	C...					

Searchable Record + Email sent to Participants

Decisions Made

Recorded Actions

Result: More follow through from meeting

Summary

- Ensure people think together.
- Deliver net value to the participants.
- Plan and be prepared.
- Operate with integrity.
- Separate context and content management.
- Manage the conversation.
- Keep improving.

Suggested Next Steps

- Pick one meeting you manage and commit to improve it.
  - Create a Meeting Purpose.
  - Create a Meeting Agenda (suggest use one of the Meeting Templates).
  - Conduct the meeting using these principles and tips.
  - Get feedback.
  - Improve the meeting until it hums.

For Further Information

- Give card to Ivan if you want:
  - Copy of this presentation.
  - Free access to on-line library of 23 articles on Conducting Effective Meetings, including a downloadable Meeting Template (includes free monthly e-newsletter).
- Contact Gary for more information about meeting software tools.

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Conducting Effective Meetings

Presented by

Ivan Rosenberg
Frontier Associates, Inc.
4804 Laurel Canyon Blvd.
Suite 804
Valley Village, CA 91607
818-505-9915
irosenberg@frontier-assoc.com

Gary Blackwood
Jet Propulsion Laboratory
4800 Oak Grove Drive
MS 126-347
Pasadena, CA 91109-8099
818-354-6263
gary.blackwood@jpl.nasa.gov